COMPOSITION

OF THE

MOTION PICTURE AUDIENCE

1940-1941

AUDIENCE RESEARCH INSTITUTE
PRINCETON

FOREWORD

For six years we have been trying to find out why more people don't go to the movies. We have found that in the case of any one picture the persons who stay away can be classified under three headings:

(1) THOSE WHO NEVER HEAR OF THE PICTURE, OR WHO HEAR OF IT TOO LATE.

The average publicity penetration of all A pictures is approximately 60 per cent in those areas where they are actually showing at the time our surveys are conducted. This means that lack of adequate publicity is responsible for reducing the size of the potential market by 40 per cent.

(2) THOSE WHO HEAR OF THE PICTURE, AND WANT TO SEE IT, BUT ARE UNABLE TO SEE IT.

This classification includes the persons who are too poor, too old, too sick, and too busy. Generally speaking there is very little you can do about them.

(3) THOSE WHO HEAR OF THE PICTURE AND ARE ABLE TO SEE IT, BUT DON'T WANT TO SEE IT.

When films cost fortunes and distribution has only a few main channels, it is imperative that every A feature should appeal to the largest possible number of theatergoers. There is no room for pictures which appeal to minorities. For better or for worse, the industry is geared to the majority. If the majority do not want to see the picture, the investment is lost.

It therefore becomes of paramount importance for the producer to have a clear picture of the majority. The more he knows about ordinary "average" theatergoers the less likely is he to make mistakes in estimating their reactions.

It was with this thought in mind that we embarked upon what we can with all modesty describe as the most ambitious statistical study of the theater-going public which has ever been undertaken.

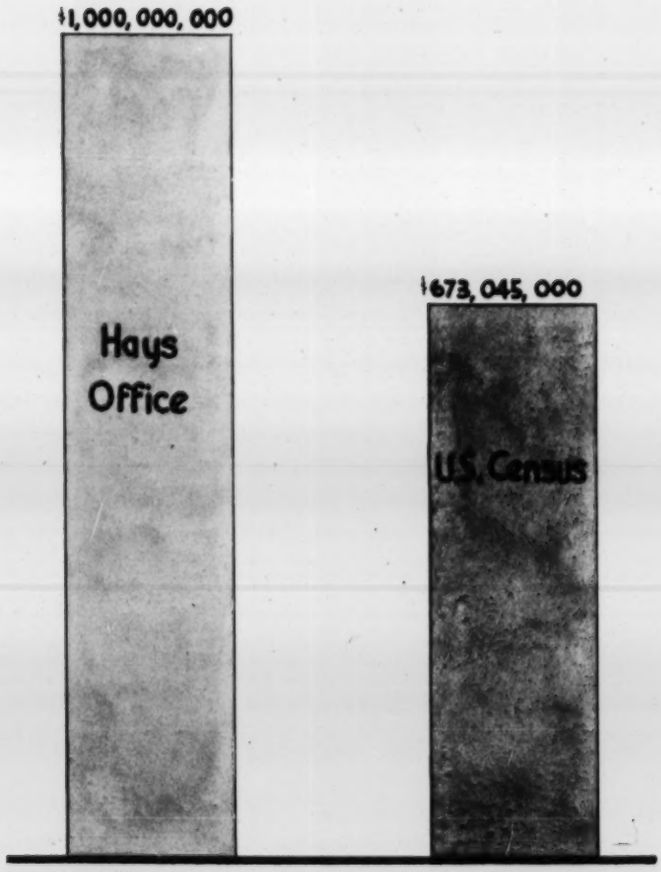
The objectives of the study were to determine the number of persons who attend motion picture theaters every week, to determine what proportion of them are males and what proportion females, to determine the number of theatergoers at each individual age from five to eighty-five—and hence the *average* age, and to assess the box-office contribution of each income group.

In presenting the results of this study we would like to express our very real gratitude to RKO Radio Pictures Inc. whose support has made it possible.

Princeton, May 1, 1941.

I.

TWO ESTIMATES OF THEATER GROSSES IN 1939

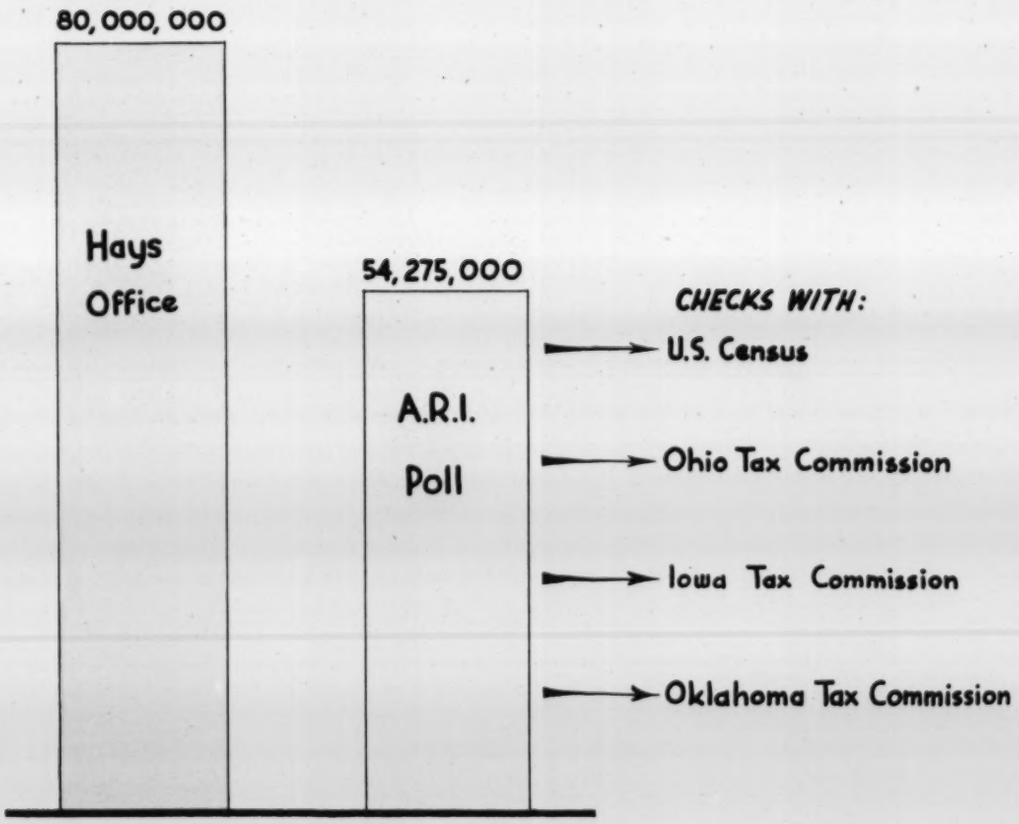


This chart highlights the exaggerations present in the statistics released by the Hays Office.

We have reason to believe that the figure obtained by the United States Census Bureau is highly accurate. In the 1939 Census theaters were required for the first time *by law* (Section IX H.R. 393) to furnish full and accurate information as to their receipts.

II.

TWO ESTIMATES OF THE AVERAGE NUMBER OF TICKETS PURCHASED WEEKLY IN 1940



The interviewing upon which our own estimate is based has been in progress in every state in the Union for the last twelve months. Our final figure of 54,275,000 is consistant with the findings of the U. S. Census. And it is also consistent with the tax figures published by the Ohio Tax Commission, the Iowa Tax Commission and the Oklahoma Tax Commission.

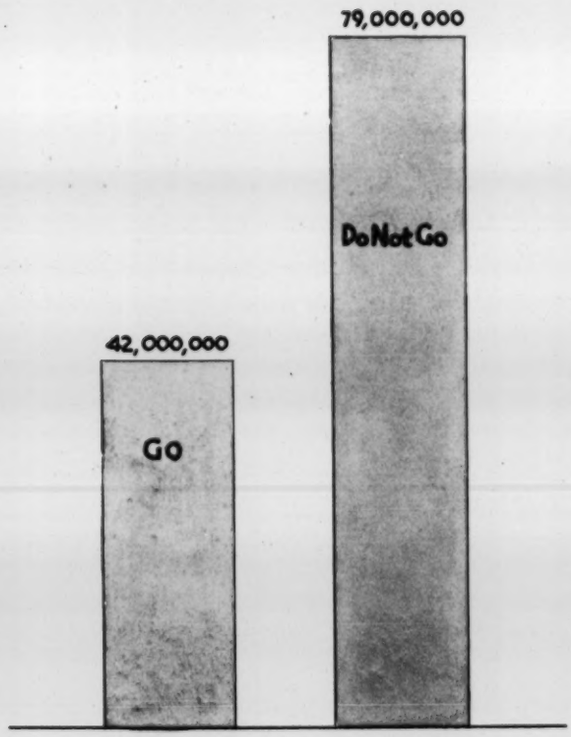
This estimate supersedes two previous estimates released by Dr. Gallup —to the Hays Office in 1938 and to the press in 1940.

Notice that this chart shows the number of tickets purchased. Some of these tickets were purchased by repeaters—persons who attend twice or more per week.

III.

HOW MANY PERSONS ATTEND MOTION PICTURE THEATERS IN AN AVERAGE WEEK?

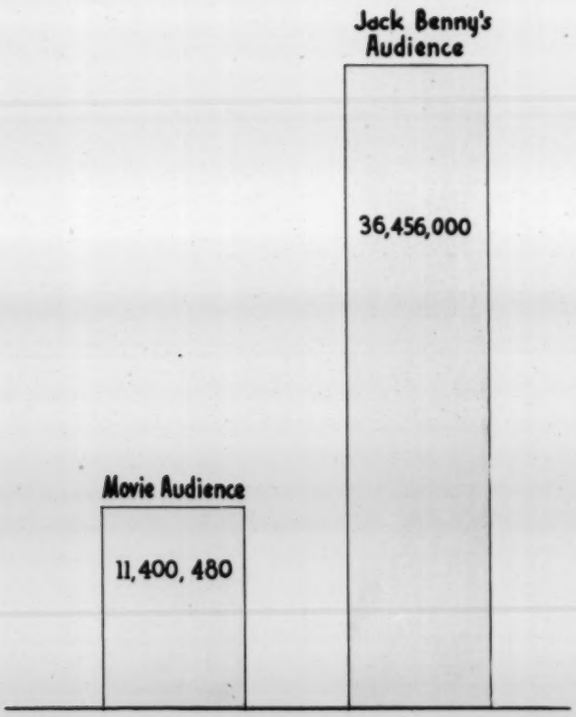
1940-41



This chart refers to persons between the ages of five and eighty-five. It shows that 35 per cent of the population attend motion picture theaters in an average week, while 65 per cent stay away.

IV.

SUNDAY

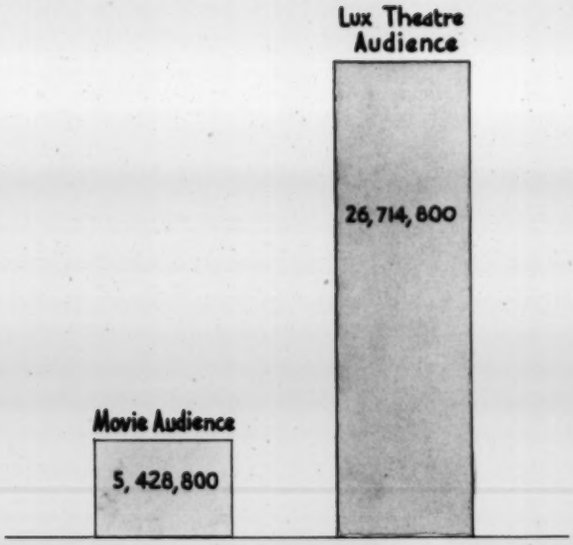


It is interesting to compare the number of persons who attend motion picture theaters on any one day with the number who listen to the radio.

More than three times as many persons listen to just this one radio program on Sunday evening as go to all the theatres in the U. S. all day on Sunday.

V.

MONDAY



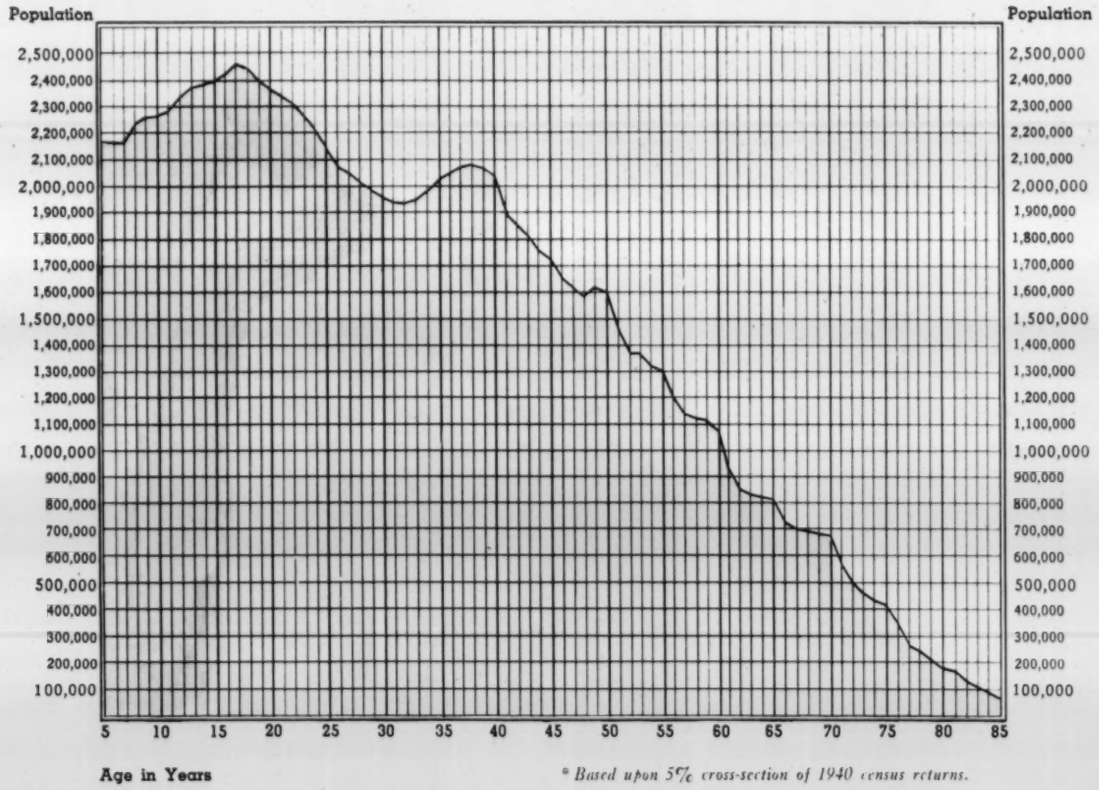
Almost five times as many persons listen to this one radio program on Monday evening as go to all the theatres in the U. S. all day on Monday—morning, afternoon and evening.

Similar charts could be made for every day in the week, all demonstrating the same thing: the persons who attend motion picture theaters in any given week represent only a minority of the population.

VI.

POPULATION OF THE UNITED STATES BY INDIVIDUAL AGES

1940-41*



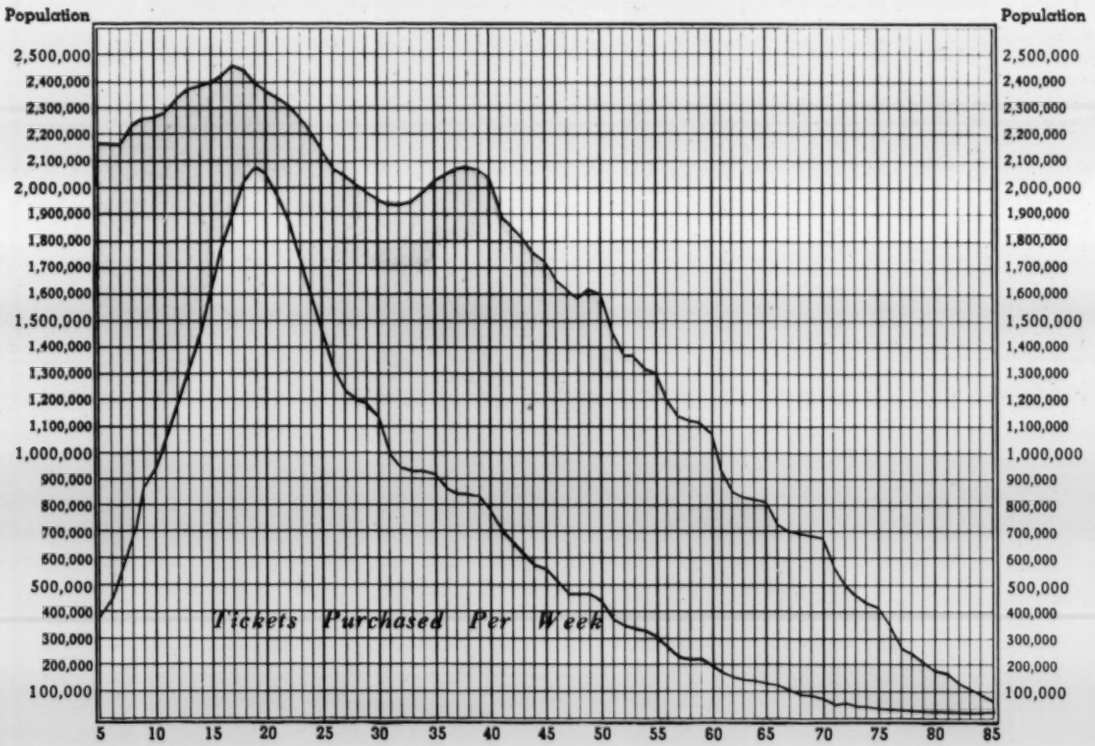
* *Based upon 5% cross-section of 1940 census returns.*

This chart shows the total number of persons at each age from five to eighty-five.

VII.

NUMBER OF TICKETS PURCHASED PER WEEK BY INDIVIDUAL AGES

1940-41



* *Based upon 5% cross-section of 1940 census returns.*

This chart shows the number of theater tickets purchased weekly by persons of each individual age, in relation to the total number of persons of that age.

The average age is only twenty-seven and one-half years. That is the bulls-eye at which to aim your pictures.

Notice how sharply the attendance curve drops away after age nineteen.

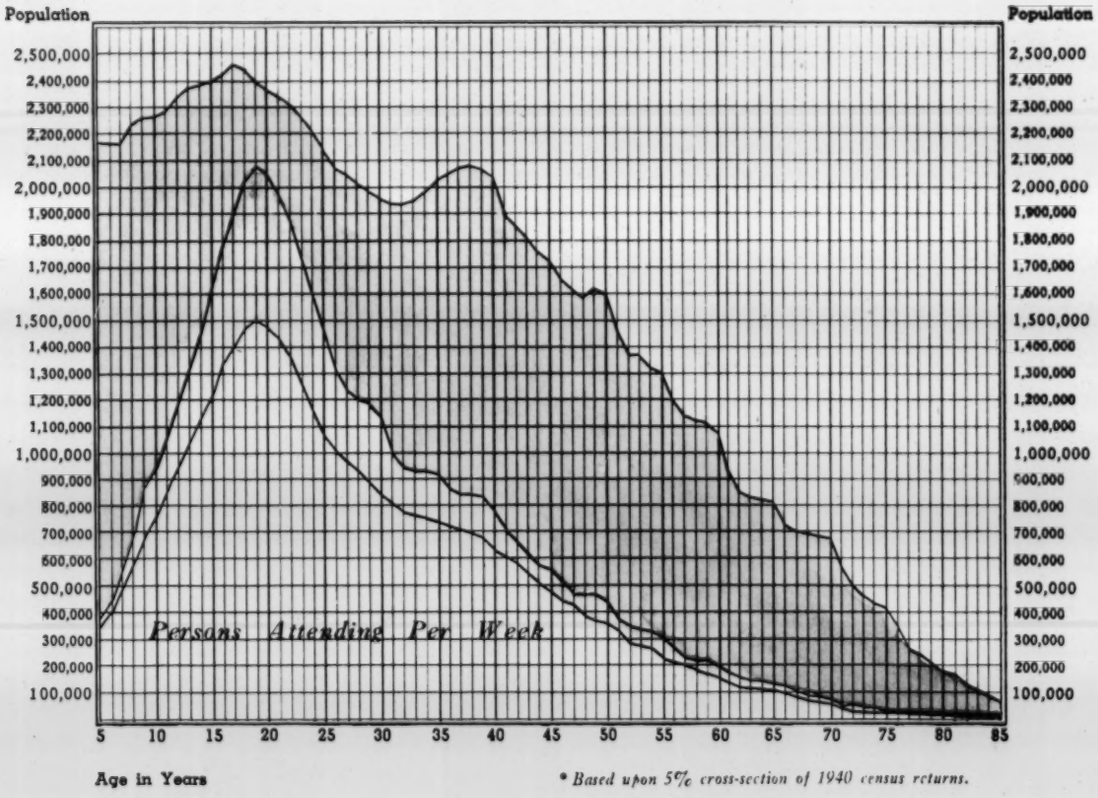
Most critics, most producers and most directors fall in the minority panhandle above thirty years of age.

Sixty-five per cent of all tickets are purchased by persons under thirty years of age.

VIII.

NUMBER OF PERSONS ATTENDING PER WEEK BY INDIVIDUAL AGES

1940-41



* *Based upon 5% cross-section of 1940 census returns.*

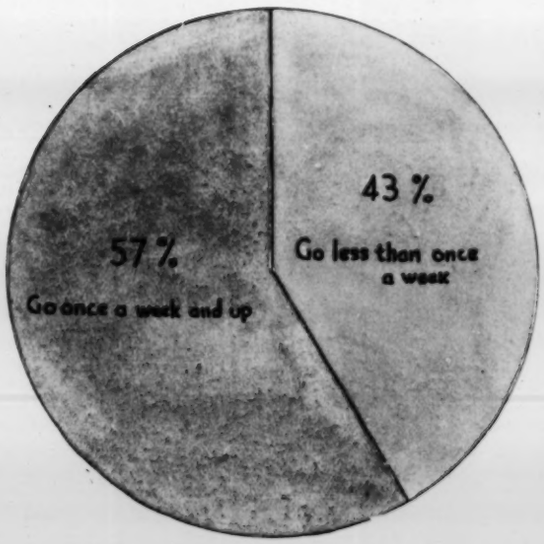
This chart is the same as the one before (VII) except that we have super-imposed on the tickets purchased the number of persons who purchase those tickets. The difference is accounted for by the persons who go more than once a week.

IX.

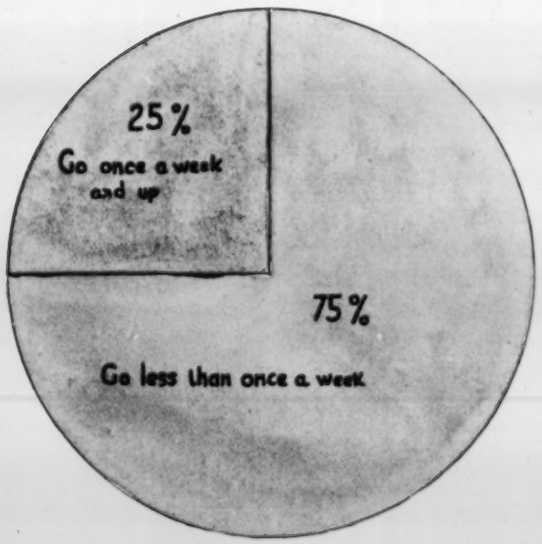
COMPARATIVE FREQUENCY OF ATTENDANCE BY PERSONS UNDER 30 YEARS AND PERSONS OVER 30 YEARS

1940-41

UNDER 30 YEARS



OVER 30 YEARS

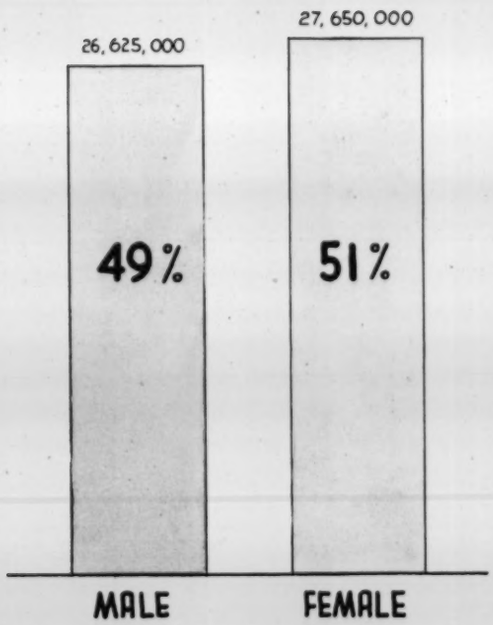


This chart shows that the average person *under* thirty attends motion picture theatres approximately twice as frequently as the average person *over* thirty.

X.

NUMBER OF TICKETS PURCHASED WEEKLY BY MALES AND FEMALES

1940-41



It has often been supposed that females account for 70 per cent of the box-office dollar. That is not the case. In actual fact females account for only 51 per cent, males for 49 per cent.

TICKETS PURCHASED WEEKLY BY MALES AND FEMALES IN EACH INCOME GROUP

1940-1941

INCOME GROUP	MALE	FEMALE	TOTAL
HIGH INCOME (Over $7,000 per year)	662,112	882,816	1,544,928
UPPER MIDDLE ($2,500-$7,000 per year)	2,452,998	2,690,003	5,143,001
MIDDLE ($1,500-$2,500 per year)	8,763,249	10,515,898	19,279,147
LOWER MIDDLE ($1,000-$1,500 per year)	5,846,116	6,491,295	12,337,411
POOR (Under $1,000 per year)	7,254,977	5,918,534	13,173,511
RELIEF (Under $750 per year)	1,645,866	1,145,523	2,791,389
	26,625,318	27,644,069	54,269,387

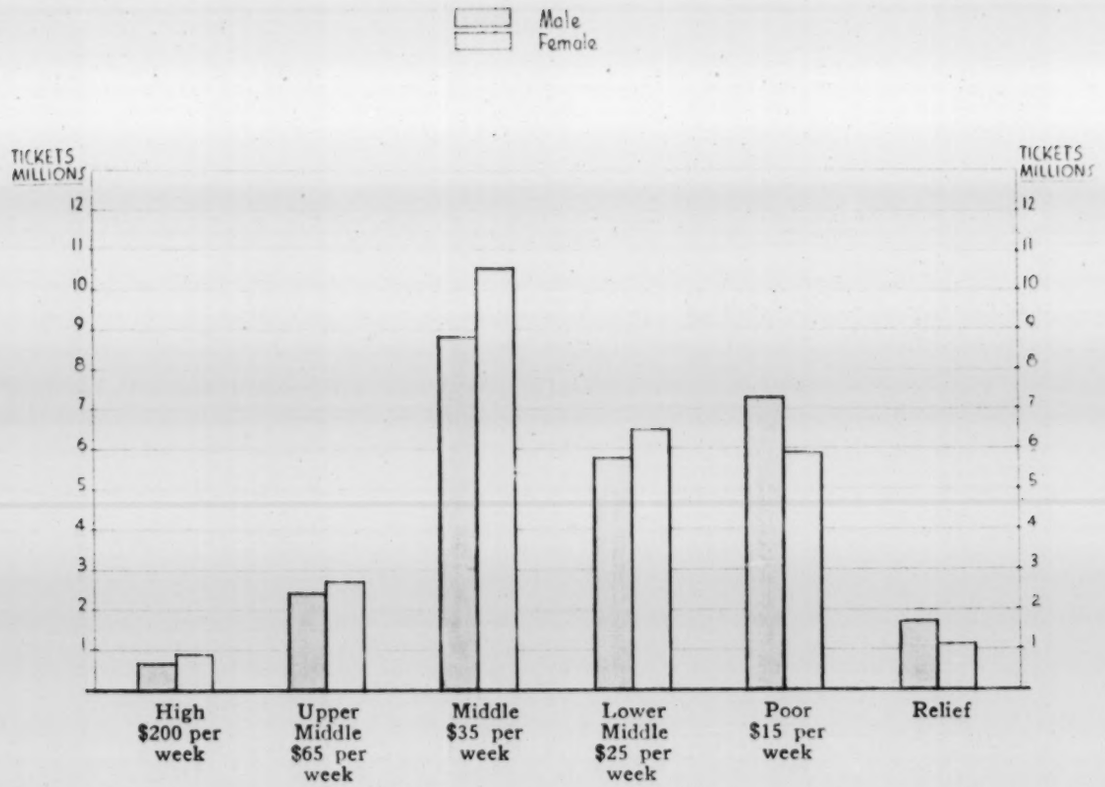
XI.

TICKETS PURCHASED WEEKLY

BY

MALES & FEMALES IN EACH INCOME GROUP

1940-41



The sex composition of audiences varies widely by economic status. In the high income groups the females purchase more tickets than the males. In the lower income groups the males purchase more tickets than the females.

BOX OFFICE CONTRIBUTION BY INCOME GROUPS

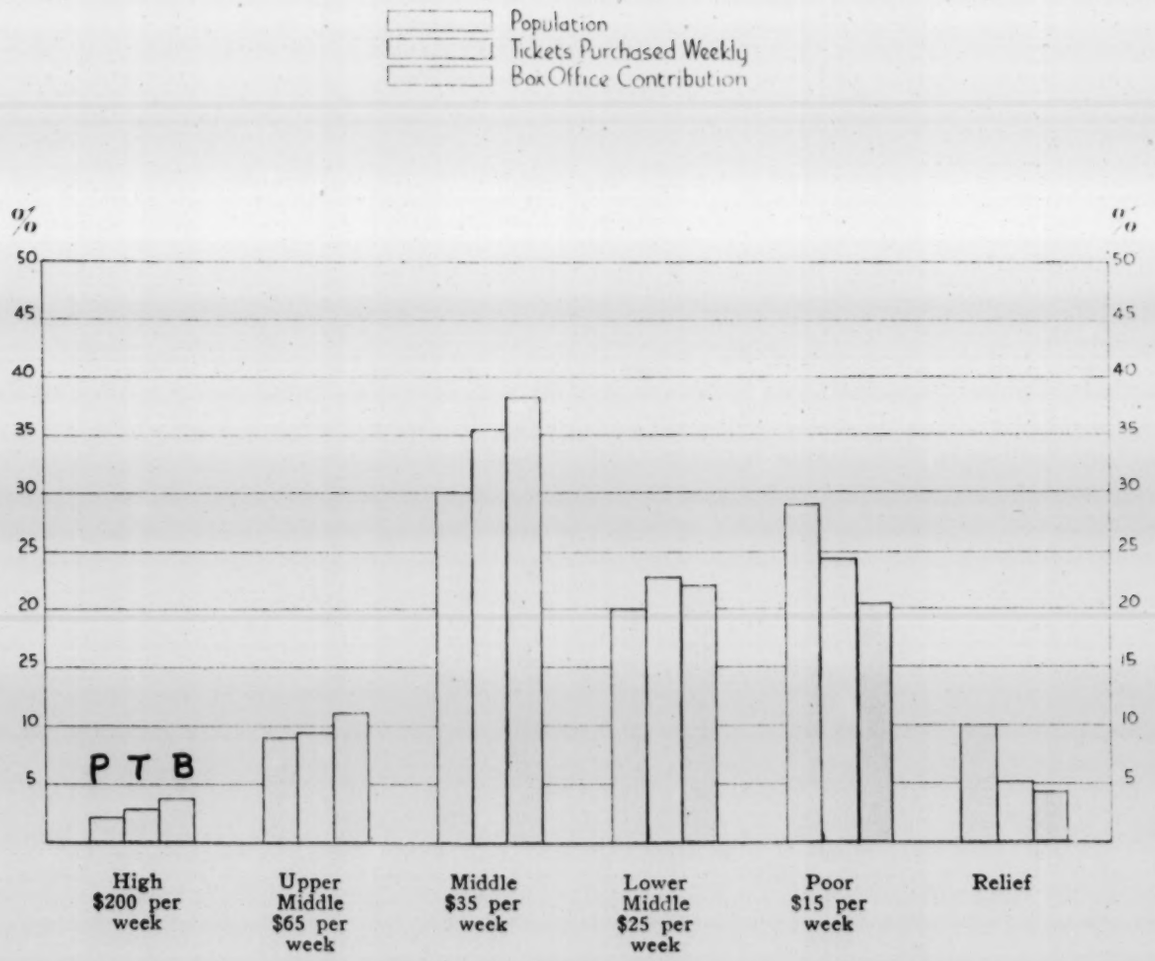
1940-1941

INCOME GROUP	POPULATION	POPULATION PER CENT	TICKETS PURCHASED	TICKETS PURCHASED PER CENT	BOX OFFICE CONTRIBUTION DOLLARS	BOX OFFICE CONTRIBUTION PER CENT
		%		%		%
HIGH INCOME (Over $7,000 per year)	2,633,386	2	1,544,928	3	$ 500,556	4
UPPER MIDDLE ($2,500-$7,000 per year)	11,850,234	9	5,143,001	9	1,476,041	11
MIDDLE ($1,500-$2,500 per year)	39,500,782	30	19,279,147	36	5,089,695	38
LOWER MIDDLE ($1,000-$1,500 per year)	26,333,854	20	12,337,411	23	2,923,966	22
POOR (Under $1,000 per year)	38,184,090	29	13,173,511	24	2,726,917	21
RELIEF (Under $750 per year)	13,166,928	10	2,791,389	5	575,026	4
	131,669,274	100	54,269,387	100	$13,292,201	100

XII.

WEEKLY BOX OFFICE CONTRIBUTION BY INCOME GROUPS

1940-41



This chart demonstrates the relative unimportance of the income group in which producers and directors themselves are found.

The typical theatre-goer has a family income of $28 per week.

No less than 88 per cent of all tickets purchased in the United States are purchased by persons whose family income is lower than $50 per week.

SUMMARY

42,000,000 persons attend motion picture theaters in an average week, and these persons buy 54,275,000 tickets.

79,000,000 persons stay away in an average week.

The typical theater-goer is 27½ years old.

The typical theater-goer has a family income of $28 a week.

75 per cent of all persons over thirty years of age attend motion picture theaters less than once a week.

Only 12 per cent of all tickets are purchased by persons with a family income in excess of $50 per week.

Females account for 51 per cent of all tickets, males for 49 per cent. In the lower income groups the males actually go more often than the females.

AGE	POPULATION*	PERSONS ATTENDING** MOTION PICTURE THEATRES PER WEEK	TICKETS** PURCHASED PER WEEK
Under 1 year	2,008,000		
1 year	2,032,096		
2 years	2,168,640		
3 years	2,132,496		
4 years	2,144,544		
5 years	2,168,640	345,600	356,753
6 years	2,168,640	410,400	454,048
7 years	2,168,640	492,480	572,966
8 years	2,216,832	578,496	696,207
9 years	2,265,024	665,520	812,963
10 years	2,265,024	753,504	937,165
11 years	2,277,072	839,160	1,067,013
12 years	2,329,280	934,960	1,207,592
13 years	2,369,440	1,036,040	1,346,529
14 years	2,385,504	1,126,224	1,474,575
15 years	2,409,600	1,219,200	1,621,601
16 years	2,481,888	1,332,408	1,793,971
17 years	2,465,824	1,385,184	1,917,573
18 years	2,453,776	1,456,624	2,030,524
19 years	2,409,600	1,502,400	2,114,087
20 years	2,369,440	1,486,800	2,102,476
21 years	2,357,392	1,422,888	1,997,772
22 years	2,329,280	1,350,240	1,869,445
23 years	2,269,040	1,261,080	1,730,609
24 years	2,216,832	1,174,656	1,613,432
25 years	2,144,544	1,087,224	1,475,296
26 years	2,108,400	1,018,500	1,355,838
27 years	2,068,240	972,320	1,288,772
28 years	2,028,080	927,180	1,213,197
29 years	1,999,968	888,432	1,156,501
30 years	1,975,872	850,176	1,095,319
31 years	1,955,792	816,212	1,043,210
32 years	1,955,792	792,836	994,462
33 years	1,959,808	767,136	957,151
34 years	1,999,968	756,960	937,165
35 years	2,032,096	744,832	911,700
36 years	2,052,176	723,576	879,789
37 years	2,068,240	706,580	866,055
38 years	2,076,272	692,780	838,367
39 years	2,072,256	672,864	816,085
40 years	2,048,160	642,600	775,966
41 years	1,907,600	583,300	703,695
42 years	1,859,408	546,340	658,110
43 years	1,807,200	520,200	621,614
44 years	1,783,104	493,728	586,659
45 years	1,734,912	466,560	553,506
46 years	1,686,720	438,480	521,314
47 years	1,686,720	425,040	504,498
48 years	1,610,416	394,584	473,648
49 years	1,626,480	385,560	462,156
50 years	1,614,432	369,840	450,685
51 years	1,485,920	325,600	399,994
52 years	1,385,520	295,320	359,154
53 years	1,385,520	284,280	352,248
54 years	1,341,344	263,192	327,643
55 years	1,305,200	247,000	312,231
56 years	1,200,784	218,868	275,351
57 years	1,140,544	201,072	250,167
58 years	1,116,448	189,040	233,751
59 years	1,116,448	180,144	222,620
60 years	1,092,352	169,728	206,924
61 years	931,712	140,128	167,205
62 years	855,408	121,836	144,983
63 years	851,392	115,328	140,059
64 years	835,328	108,992	129,088
65 years	827,296	101,352	119,598
66 years	734,928	84,180	98,917
67 years	690,752	75,680	89,529
68 years	706,816	73,920	88,087
69 years	714,848	71,200	85,525
70 years	678,704	64,896	74,433
71 years	578,304	52,992	60,540
72 years	506,016	44,352	50,450
73 years	473,888	39,176	44,884
74 years	433,728	33,264	38,919
75 years	405,616	29,492	32,352
76 years	337,344	23,184	25,225
77 years	269,072	17,420	18,778
78 years	240,960	14,880	16,816
79 years	220,880	12,980	14,314
80 years	196,784	10,976	11,772
81 years	160,640	8,480	9,609
82 years	124,496	6,448	6,826
83 years	108,432	5,292	5,406
84 years	100,400	4,800	5,005
85 years	88,352	3,872	3,964
86 years	65,260	2,535	2,602
87 years	58,232	2,262	2,322
88 years	44,176	1,672	1,762
89 years	34,136	1,156	1,191
90 years	30,120	900	921
91 years	20,080	600	614
92 years	12,048	300	306
93 years	10,040	250	254
94 years	7,028	140	142
95 years	3,514	53	54
96 years	2,510		
97 years	1,606		
98 years	1,506		
99 years	1,004		
100 years and over	2,510		
TOTALS	131,661,146	42,106,936	54,288,666

*Based upon a 5% cross-section of the 1940 Census returns.

**Yearly average.

Confidential Motion Picture Attendance Report #3

CONFIDENTIAL

MOTION PICTURE ATTENDANCE REPORT

PREPARED FOR

CLIENTS OF AUDIENCE RESEARCH, INC.

Report No. 3

AUDIENCE RESEARCH, INC.

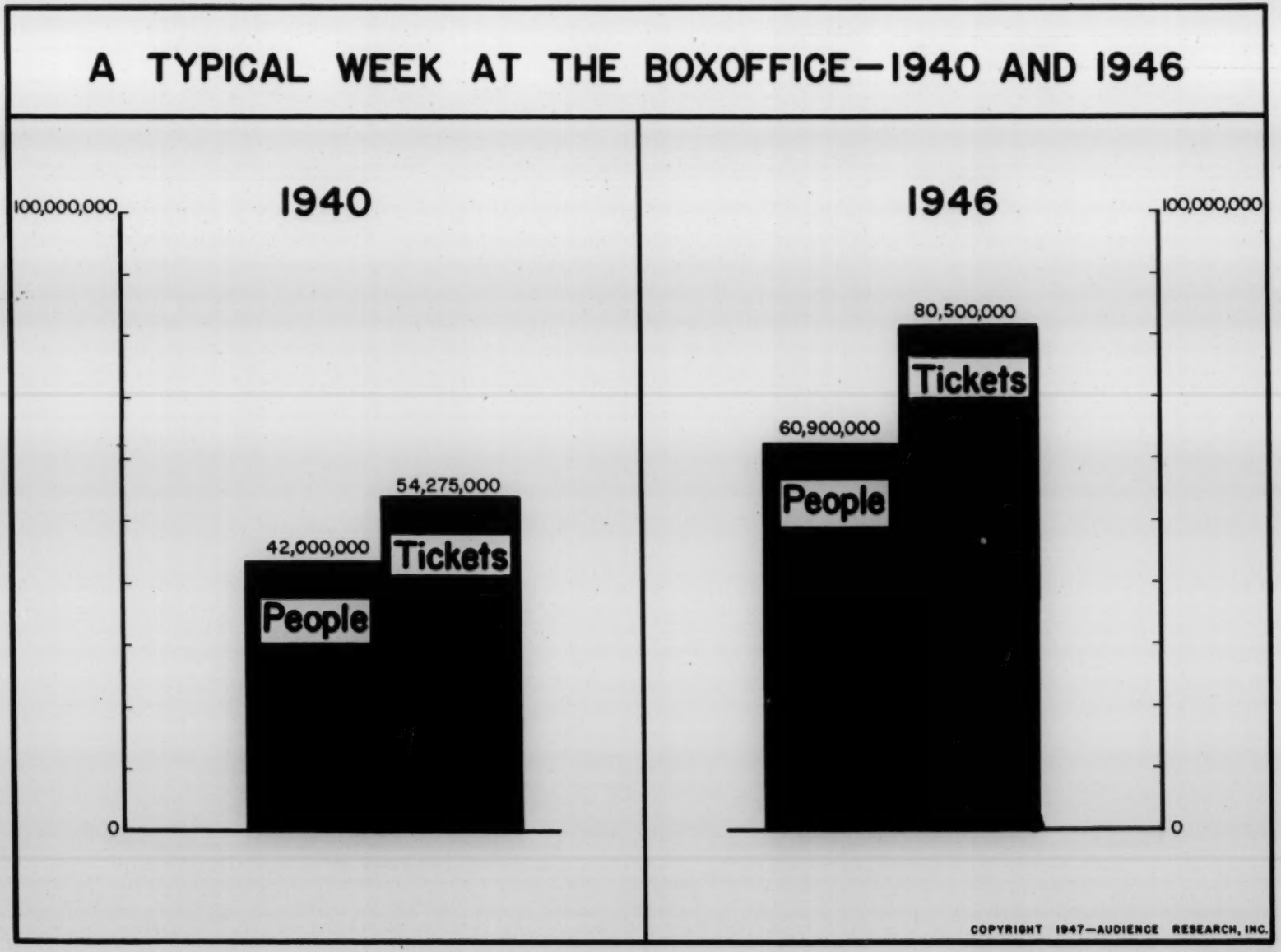
PRINCETON - NEW YORK - HOLLYWOOD

1946 - THE BIGGEST YEAR IN HISTORY

80,500,000 TICKETS PER WEEK

AN INCREASE OF 26,225,000 SINCE 1940

A TYPICAL WEEK AT THE BOXOFFICE—1940 AND 1946



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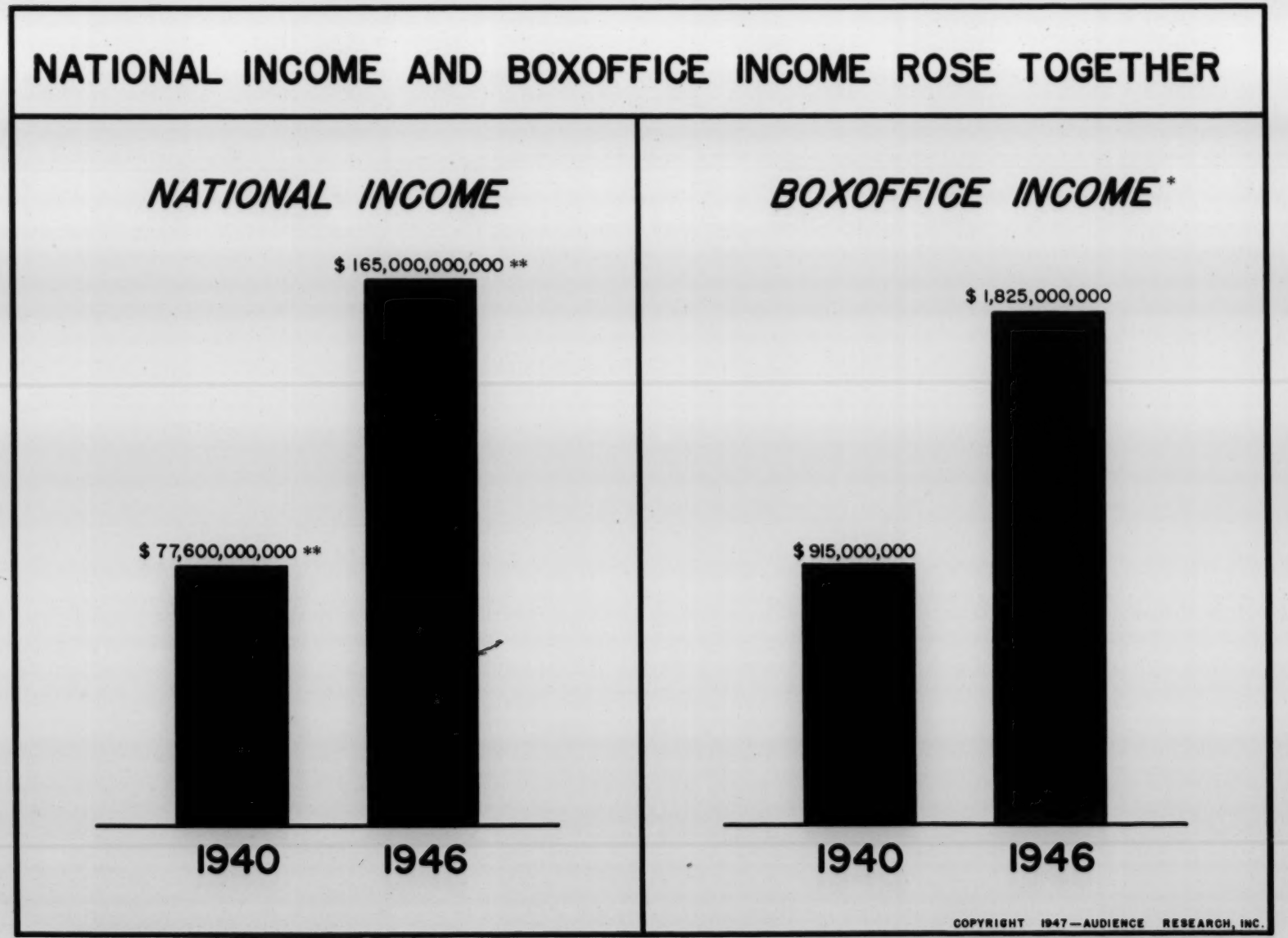
INCREASE IN BOXOFFICE RECEIPTS FROM 1940 TO 1946 CLOSELY PARALLELED THE INCREASE IN NATIONAL INCOME.

MANY ECONOMISTS PREDICT A DECLINE IN NATIONAL INCOME — *CLEARLY A WARNING.*

NATIONAL INCOME AND BOXOFFICE INCOME ROSE TOGETHER



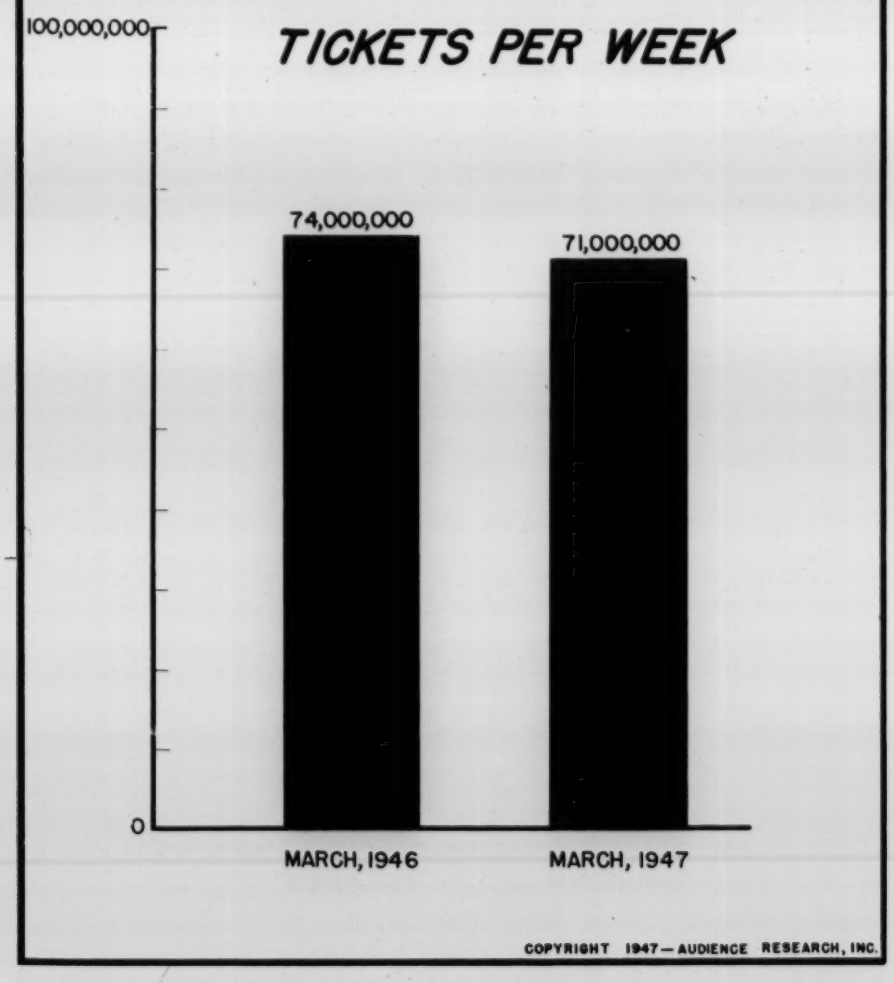
* INCLUDES TAXES.

** SOURCE— U. S. DEPARTMENT OF COMMERCE.

AVERAGE WEEKLY ADMISSIONS FOR MARCH, 1947

ARE 3,000,000 LESS THAN IN MARCH, 1946.

DECLINE IN WEEKLY ADMISSIONS



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QUESTION:

IS THE MARKET FOR MOTION PICTURES BEING FULLY EXPLOITED ?

ANSWER:

OBVIOUSLY NO!

DURING A TYPICAL MARCH WEEK MORE PEOPLE

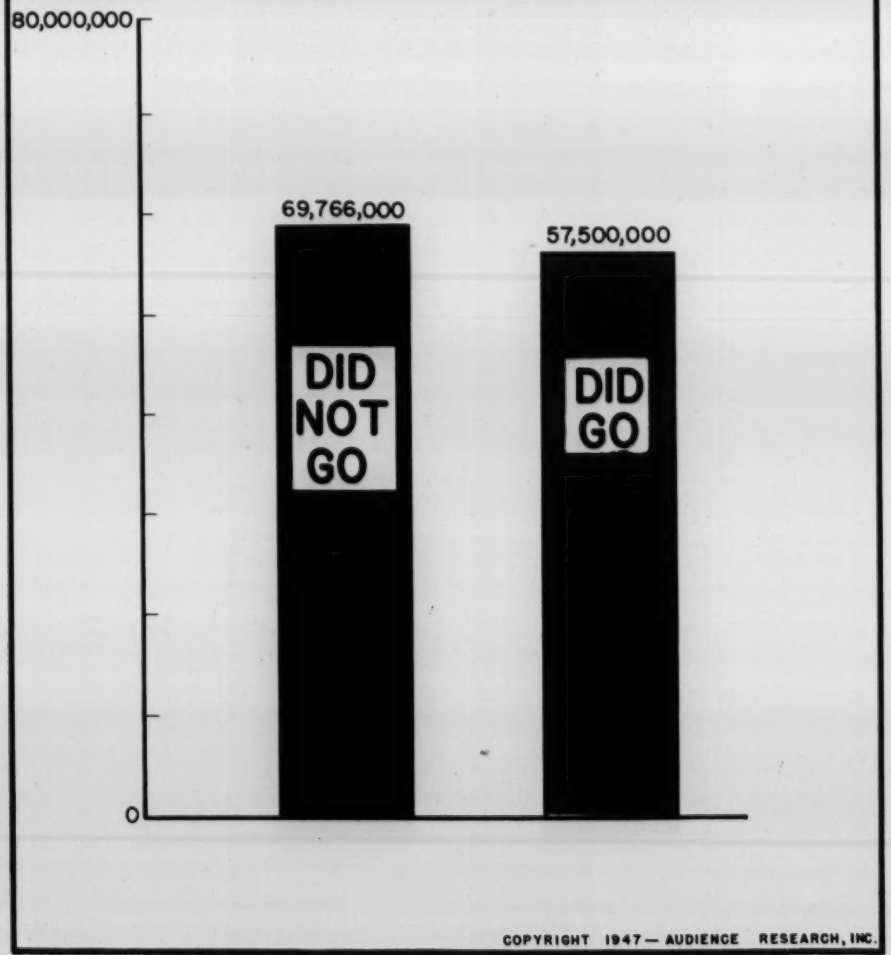
STAYED AWAY FROM THE MOVIES THAN ATTENDED

57,500,000 WENT TO THE MOVIES IN AN AVERAGE MARCH WEEK.

69,766,000 STAYED AWAY FROM THE MOVIES IN AN AVERAGE MARCH WEEK.

127,266,000 IS THE TOTAL POPULATION FIVE YEARS AND OLDER, EXCLUDING PEOPLE IN INSTITUTIONS AND THOSE IN ARMED SERVICES.

MORE PEOPLE STAYED AWAY FROM THE MOVIES THAN WENT IN AN AVERAGE WEEK (March, 1947)



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NOTE — THE ESTIMATED TOTAL OF 127,266,000 POTENTIAL MOVIEGOERS (69,766,000 PLUS 57,500,000) EXCLUDES PERSONS UNDER FIVE YEARS OF AGE, PERSONS IN THE ARMED FORCES, AND PERSONS IN INSTITUTIONS.

WHAT SEGMENTS OF THE MARKET OFFER POSSIBILITIES FOR REVENUE TO REPLACE LOSS CAUSED BY A GENERAL DECLINE IN ATTENDANCE ?

THE MAJOR PART OF THE TOTAL RENTAL OF MOST FILMS COMES FROM TOWNS AND CITIES OF GREATER POPULATION THAN 10,000.

THEREFORE, THE FOLLOWING ANALYSIS OF THE POTENTIAL MARKET IS BASED ON ATTENDANCE IN SUCH CITIES.

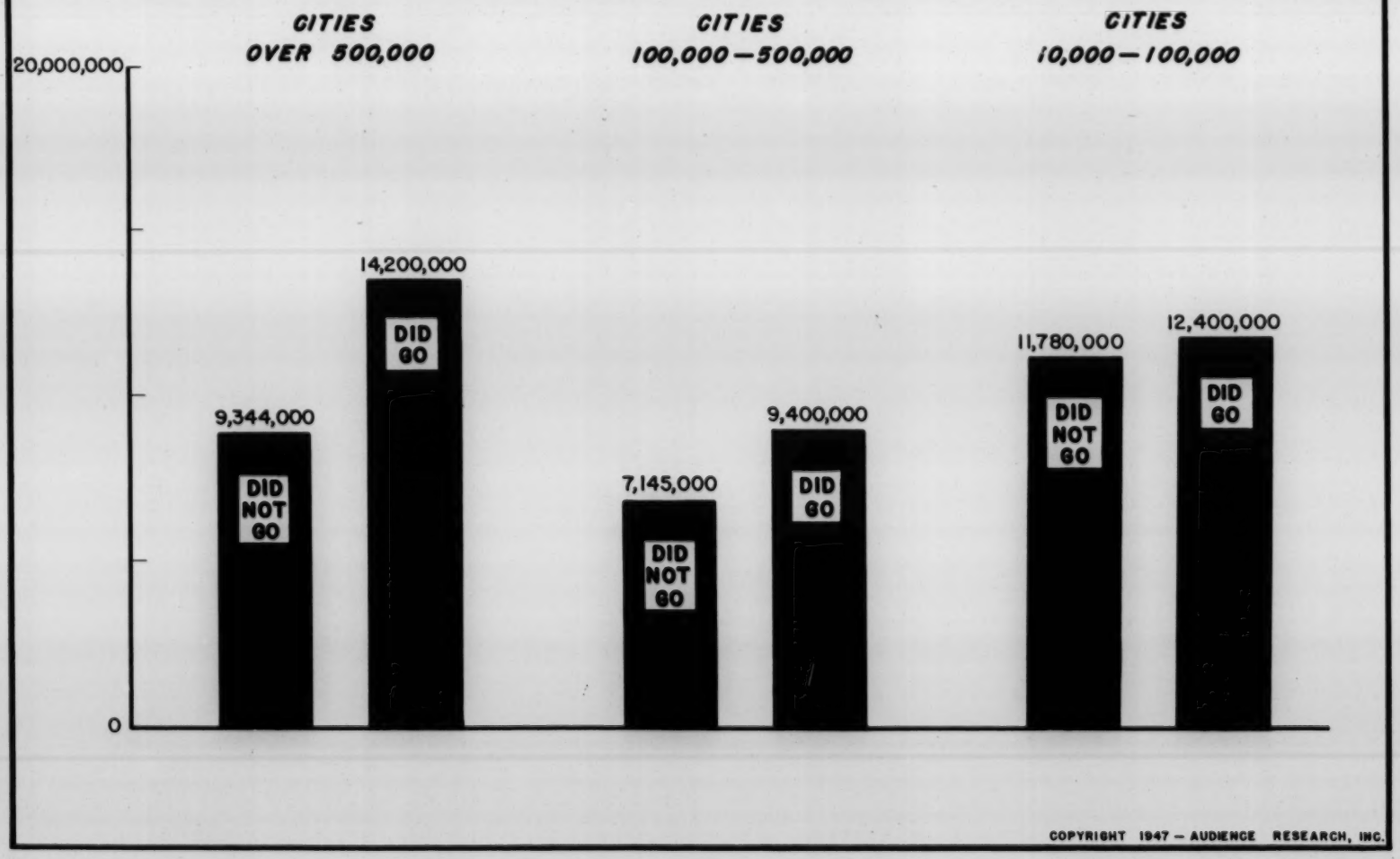
THERE IS A LARGE POTENTIAL MOTION PICTURE MARKET

IN COMMUNITIES ABOVE 10,000 POPULATION

SIZE OF CITY	DID NOT GO	DID GO
500,000 +	9,344,000	14,200,000
100,000 - 500,000	7,145,000	9,400,000
10,000 - 100,000	11,780,000	12,400,000
TOTALS	28,269,000	36,000,000

POTENTIAL MARKET IN CITIES OVER 10,000

(MARCH, 1947)



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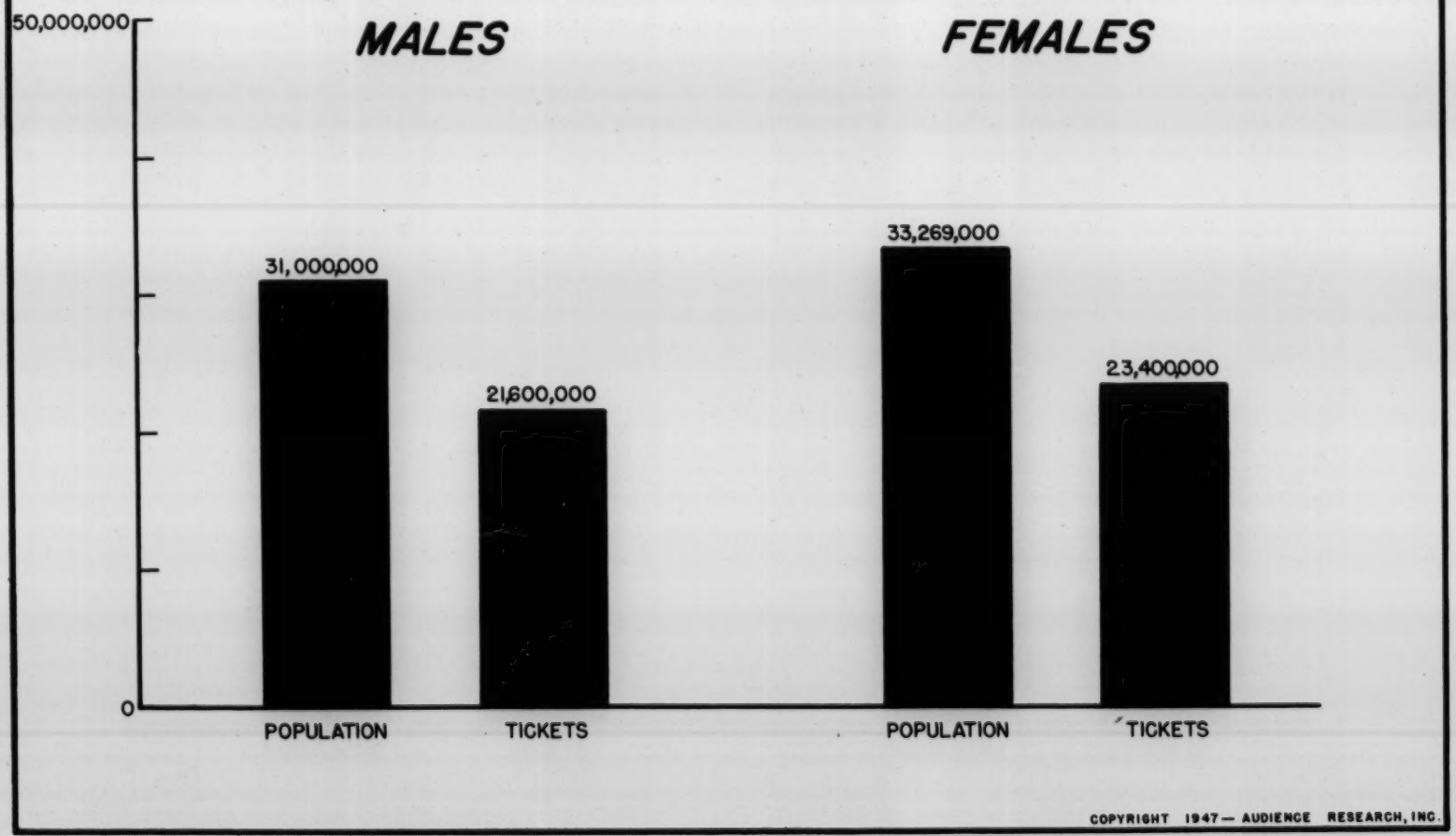
MEN BUY ALMOST AS MANY TICKETS AS WOMEN
POTENTIAL MARKET SAME FOR BOTH

SEX	POPULATION	TICKETS
MALES	31,000,000	21,600,000
FEMALES	33,269,000	23,400,000
TOTALS	64,269,000	45,000,000

BUT WOMEN HAVE MORE INFLUENCE IN CHOOSING THE PICTURE WHERE MEN AND WOMEN GO TOGETHER.

AND HALF OF A TYPICAL MOVIE AUDIENCE IS COMPOSED OF MEN AND WOMEN GOING TOGETHER.

MEN BOUGHT ALMOST AS MANY TICKETS AS WOMEN *
(March, 1947)



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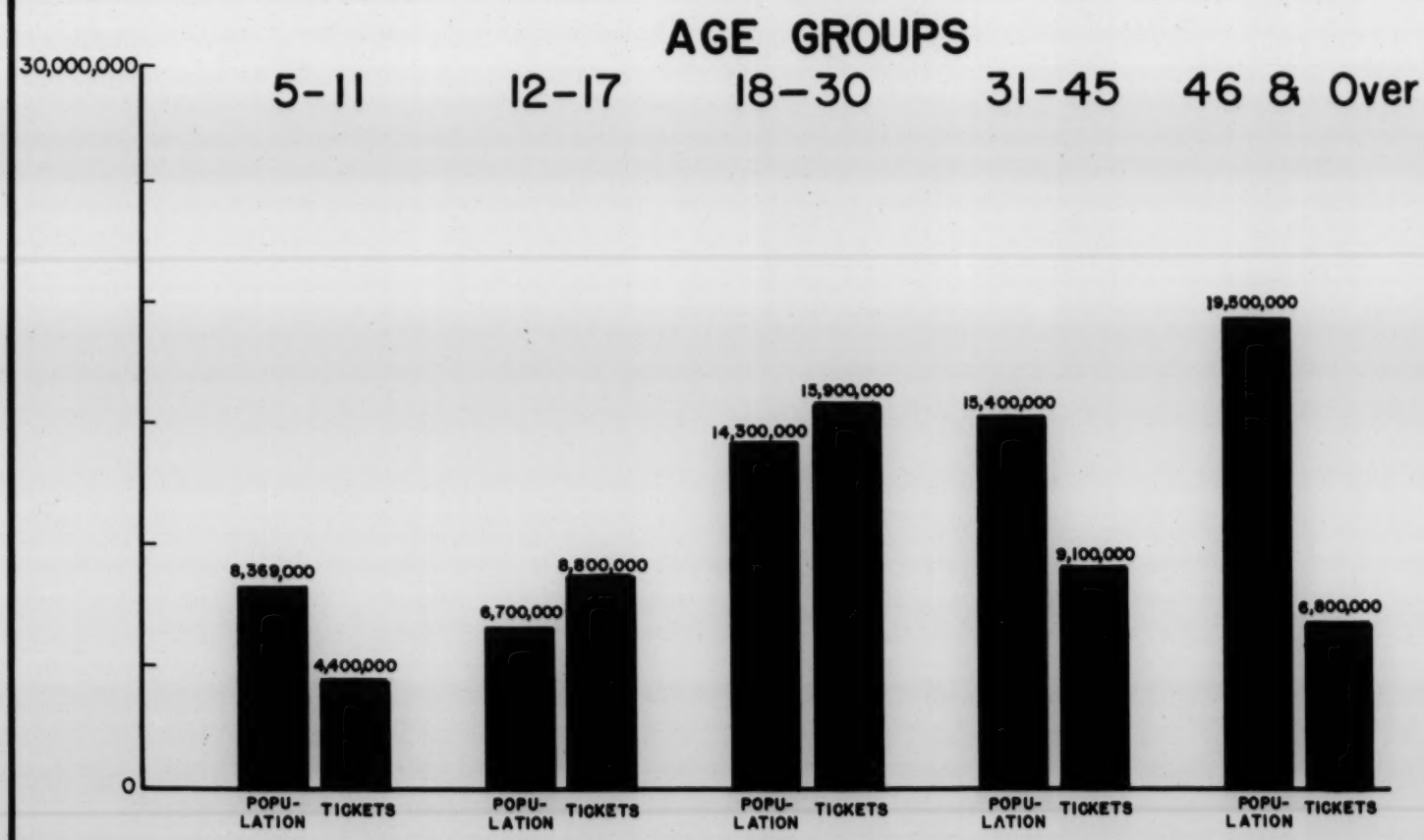
*CITIES OVER 10,000 POPULATION.

ADMISSIONS BY AGE GROUPS SHOW PEAK IN 18-30 GROUP

AGE GROUP	POPULATION	TICKETS
46+	19,500,000	6,800,000
31-45	15,400,000	9,100,000
18-30	14,300,000	15,900,000
12-17	6,700,000	8,800,000
5-11	8,369,000	4,400,000
TOTALS	64,269,000	45,000,000

POPULATION AND TICKETS FOR ALL AGE GROUPS*



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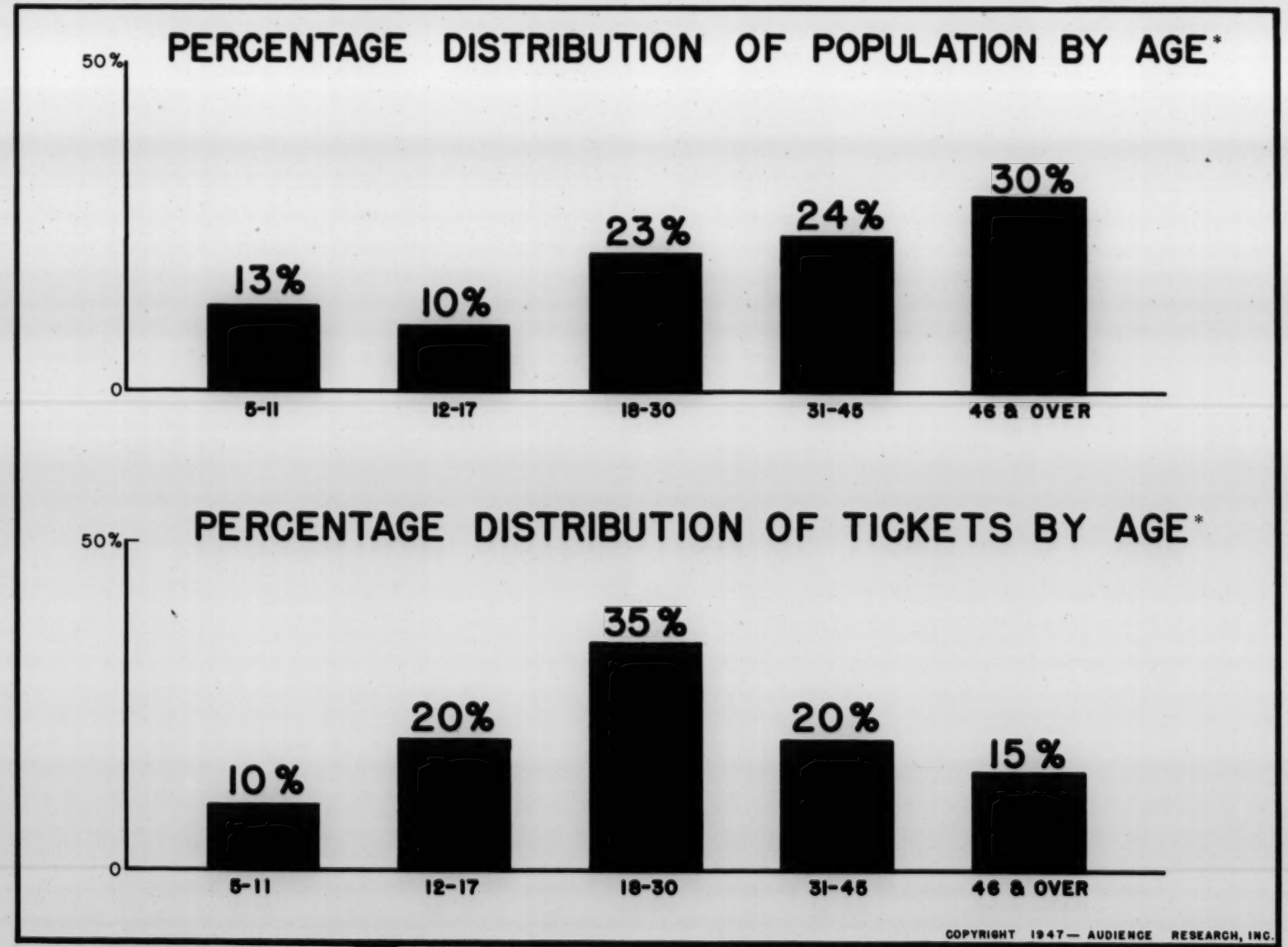
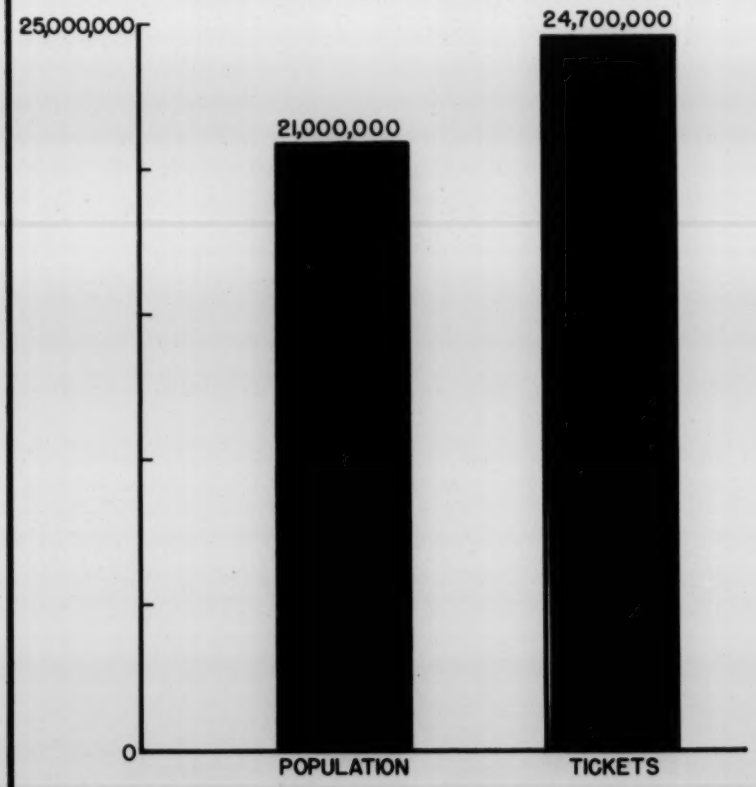


*CITIES OVER 10,000 POPULATION.

ANALYSIS OF MOTION PICTURE ATTENDANCE BY AGE SHOWS THAT FOR EVERY POTENTIAL MOVIE-GOER 12-30 THERE IS AT LEAST ONE TICKET SOLD EACH WEEK.

AT THE PRESENT HIGH RATE OF ATTENDANCE THE SATURATION POINT MAY WELL HAVE BEEN REACHED AMONG MOVIE-GOERS 12-30.

ADMISSIONS OF PERSONS 12-30 YEARS AVERAGE ONE PER WEEK*



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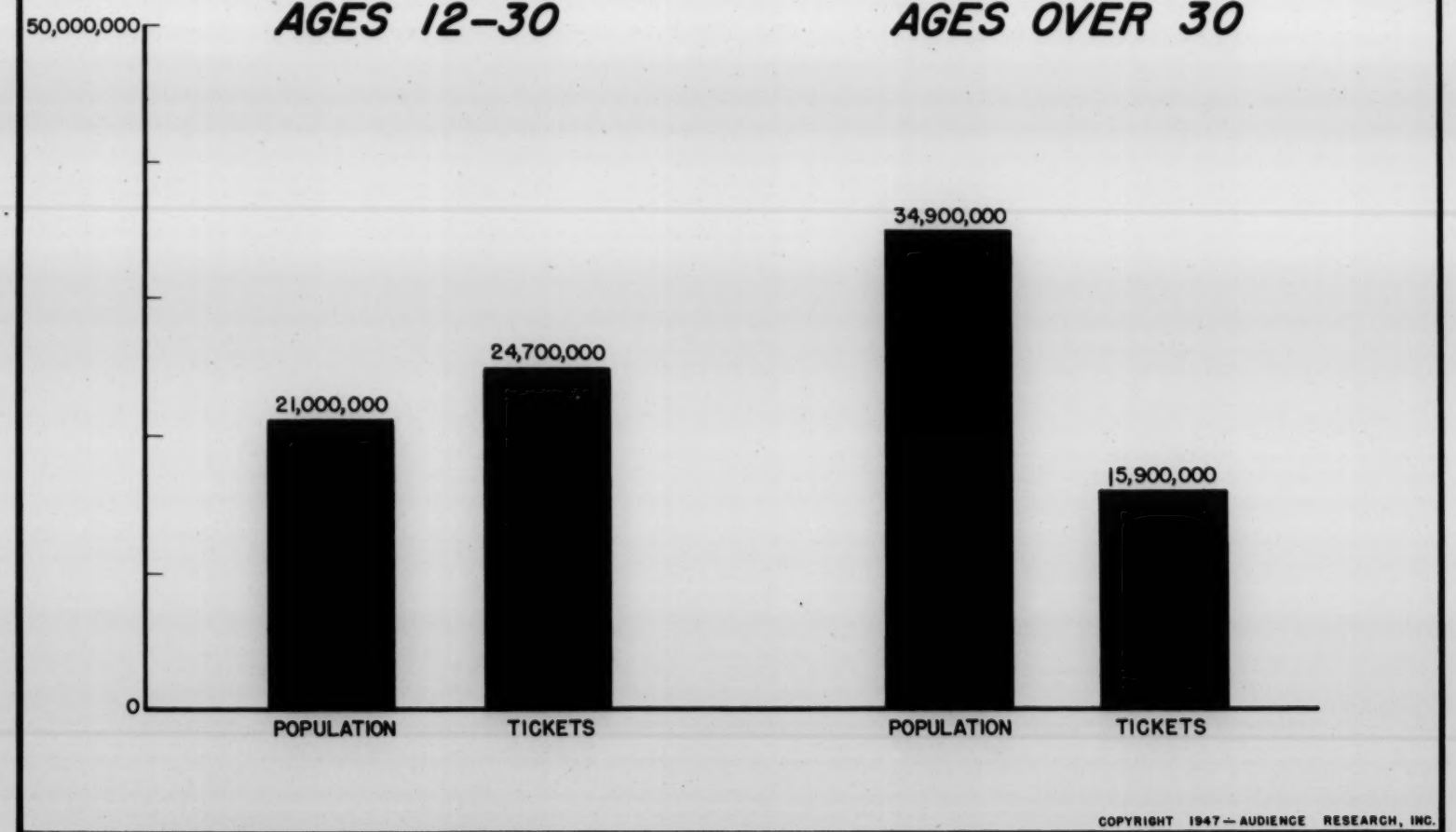
BY CONTRAST, THOSE OVER 30 INCLUDE A LARGE UNTAPPED MARKET OF POTENTIAL MOVIE-GOERS. COMPRISING 62 PER CENT OF THE POPULATION, THEY NOW BUY ONLY 39 PER CENT OF THE TICKETS.

AGE GROUP	POPULATION	%	TICKETS	%
31+	34,900,000	62	15,900,000	39
12-30	21,000,000	38	24,700,000	61
TOTALS	55,900,000	100	40,600,000	100

PEOPLE OVER 30 PROVIDE A LARGE UNTAPPED MARKET*



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*CITIES OVER 10,000 POPULATION.

THE ONE FACT SHOWN WHICH STANDS OUT IN ITS IMPORTANCE TO THE PRODUCER OF MOTION PICTURES IS THE PREDOMINANCE OF THE 18 TO 30 AGE GROUP AMONG MOVIE-GOERS. *THESE PEOPLE COMPRISE THE HEART OF THE MARKET AT THE PRESENT TIME.*

WITH THE LIKELIHOOD OF A DECLINING MARKET IT WILL BE MORE IMPORTANT THAN EVER IN THE MONTHS AHEAD IN CONSIDERING STORY MATERIAL, CAST VALUES, AND TITLES TO BEAR IN MIND *THAT YOUR PRINCIPAL TARGET IS THE 18 TO 30 AGE GROUP.*

ARI'S SUBJECT MATTER TEST, TITLE TEST, AUDIT OF PLAYER MARQUEE VALUES AND WANT-TO-SEE TEST CAN BE OF SERVICE TO YOU IN ASSESSING THE RELATIVE APPEAL TO MOVIE-GOERS 18 TO 30 OF THE MATERIAL AVAILABLE TO YOU *BEFORE PRODUCTION BEGINS.*